# 11. PreAward Survey-Informal

## 11.1 Summary

The Informal PreAward Survey screen (Figure 11.4) allows you to enter information about Informal PreAward Surveys such as the dollar value involved and who the requester is. When this screen first opens, you must select either Open or New (Section 6). The procedures for using these options in the Informal PreAward Survey function are discussed below.

### Open

When you want to find an existing record to view or edit, select Open. (Click on Open in the drop-down list of File options or click on the Open icon.) The Informal PreAward Survey Search window shown in Figure 11.1 appears on your monitor. To search for a record to open, select the circle in front of the type of information you want to search for, and then click on **OK**. You can search for a particular CAGE Code, Contractor Name or Date Requested. You can also search for a particular CAGE Code *and* Date Requested *OR* for a particular Contractor Name *and* Date Requested.
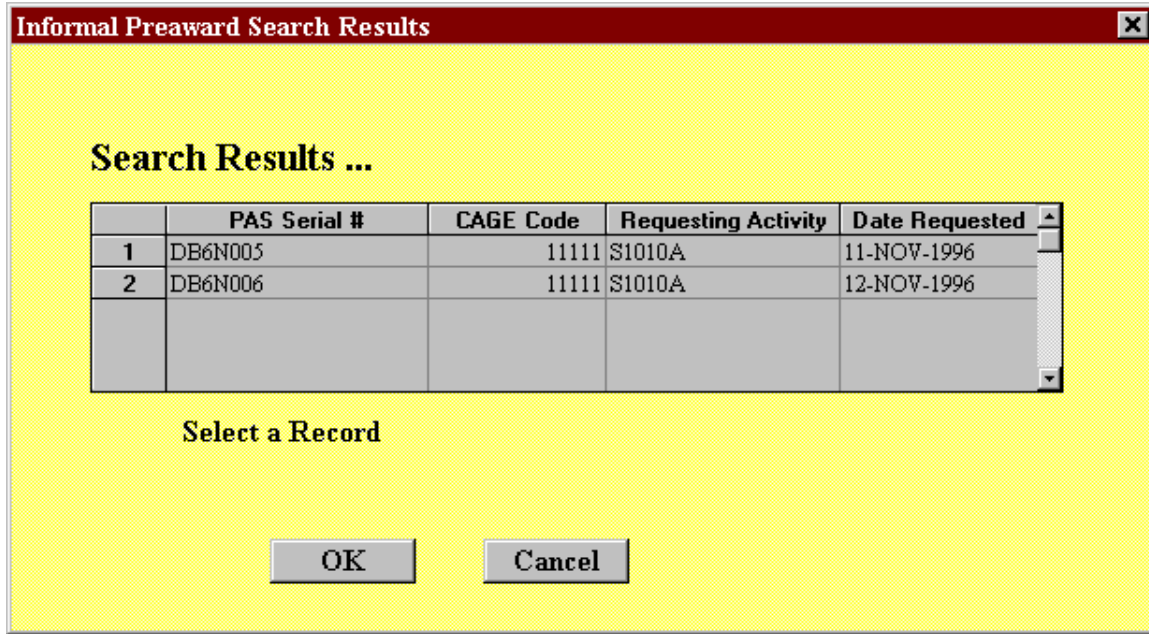


**Figure 11.1 Informal PreAward Survey Search Pop-Up Window**

When you click **OK**, the application searches for records which meet your search criteria. One of two things will happen as a result of the search: matching records will be found or no matching records will be found. If matching records are found, they are displayed in a Search Results window (Figure 11.2) which pops up on your monitor. When this window appears, find and select the record you want, and then click on **OK**. The information associated with the record is displayed on your screen.

**Informal Preaward Search Results** ✕

## Search Results ...

| | PAS Serial # | CAGE Code | Requesting Activity | Date Requested |
|---|---|---|---|---|
| 1 | DB6N005 | 11111 | S1010A | 11-NOV-1996 |
| 2 | DB6N006 | 11111 | S1010A | 12-NOV-1996 |

**Select a Record**

| OK | Cancel |

**Figure 11.2 Informal PreAward Survey Search Results Pop-Up Window**

If no records are found, a message window (Figure 11.3) will pop up on your monitor to inform you that "No data met your search criteria." Click **OK** to make this window disappear.

**Message** ✕

No data met your search criteria

| OK |

**Figure 11.3 No Data...Pop-Up Message**

*New*

If you want to add a new record, select New. (Click on New in the drop-down list of File options or click on the New icon.) When you do, the cursor appears in the CAGE Code box ready for you to enter information. (See 11.2.1.1 CAGE Code.)

### 11.2  Informal PreAward Survey Screen



**Figure 11.4 Informal PreAward Survey Screen**
**Note: Numbers in data boxes indicate corresponding section numbers.**

11.2.1  Fields for Informal PreAward Survey Screen

#### 11.2.1.1  CAGE Code

Enter the 5-character Commercial and Government Entity (CAGE) Code which identifies the contractor/location. This is an optional data element, but if entered, it will be validated. If valid, the corresponding Offeror information will be displayed in the Offeror data boxes. *Notes: Because the CAGE Code is optional, you can leave the box blank and move on to the next data box by pressing Tab or Enter. You can add this CAGE Code at a later date.*

#### 11.2.1.2  Offeror

The Offeror data boxes (name, address, city, state and zip) are automatically populated based on the CAGE Code that is entered (Section 11.2.1.1), and it is protected.

### 11.2.1.3  CAO Organization Code

This protected data box is automatically populated based on the Username entered during the log-in process.

### 11.2.1.4  Informal No

This protected data box is automatically populated after the CAGE Code is entered with a unique identifier (up to 9 alphanumeric characters). The first two characters represent the CAO Organization Code of the current user. The third position is numeric, the last digit in the fiscal year. The fourth position is the month represented as a number (1=January, 2=February, 3=March, 4=April, 5= May, 6=June, 7=July, 8=August and 9=September) or alphabet letter (O=October, N=November and D=December) The fifth, sixth and seventh characters are sequential numbers generated by the system.

### 11.2.1.5  Solicitation No

Enter a unique identifier (up to 17 alphanumeric characters) for the request.

### 11.2.1.6  Dollar Value

Enter the value (dollar amount) of the request or solicitation. You can enter up to fourteen (14) digits, either as a whole dollar amount or as dollars and cents.

### 11.2.1.7  Requesting Activity

Enter the 6-character (alphanumeric) DoDAAC code which identifies the Requesting Activity. *Note: If the Requesting Activity DoDAAC is not available, use your own CAS Activity DoDAAC in its place.*

### 11.2.1.8  Requesting Activity Name

This protected data box is automatically populated based on the Requesting Activity code entered above (Section 11.2.1.7).

### 11.2.1.9  Requester Name

Enter the name of the person requesting the informal survey (up to 28 alphanumeric characters).

### 11.2.1.10  Requester Phone

Enter the telephone number (10-26 digits) of the person requesting the informal survey. If you enter ten (10) digits, the number is automatically formatted as xxx-xxx-xxxx. If you enter 11-26 digits, the number appears exactly as you type it.

### 11.2.1.11  Requester DSN

Enter the Defense Switched Network (DSN) number (7 or 10-15 digits) of the person requesting the informal survey. If you enter seven (7) digits, the number is automatically formatted as xxx-xxxx. If you enter ten (10) digits, the number is automatically formatted as xxx-xxx-xxxx. If you enter 11-15 digits, the number appears exactly as you type it.

### 11.2.1.12 Date Requested

Enter the date (MMDDYY format) on which the Buying Activity requested Informal information. The Date Requested must be the same as or earlier than the current date (Date Requested $\leq$ System Date). This is a required data element.

### 11.2.1.13 Response Date

Enter the date (MMDDYY format) on which the PreAward Survey manager responded to the requester. The Response Date must be the same as or later than the Date Requested and the same as or earlier than the current date (Date Requested $\leq$ Response Date $\leq$ System Date). This is a required data element.

### 11.2.1.14 Item/Service

Enter a short descriptor (up to 35 alphanumeric characters) for the item or service.

### 11.2.1.15 Recommend On-Site Survey be Conducted

Select the circle in front of Yes or the circle in front of No to indicate whether or not an on-site survey is recommended. This is a required data element.

### 11.2.1.16 Remarks

Type in any additional information (up to 250 alphanumeric characters) pertinent to the informal survey. *Note: The system will not automatically alert you when you exceed 250 characters. If you exceed 250 characters, a pop-up message will inform you that you can only have 250 characters to save the record successfully. Delete excess verbiage.*